

ELECTRONIC RECORDS MANAGEMENT

Information Management and Research
Skills Course September 09

MS-TCDC

ARUSHA TANZANIA

Learning Objectives

- ▶ To give the course participants an overview on e-Records and how e-Record can effectively be managed
- ▶ To demonstrate the use of Windows explorer and how it can effectively be used for managing e-files and folders

During the past decade, the recordkeeping practices in public and private organizations have been revolutionized. New information technologies from mainframes, to PC's, to local area networks and the Internet have transformed the way many if not all organizations create, use, disseminate, and store information.

INTRODUCTION

- ▶ Electronic records are records generated and stored in electronic form.
- ▶ Electronic records management is the practice of maintaining the electronic records of an organization from the time they are created up to their eventual disposal.

Good Electronic Record-Keeping Requires

- ▶ Electronic record-keeping systems that are designed to manage reliable and authentic records.
- ▶ A strategy to ensure that electronic records will remain accessible and usable for as long as they are needed.
- ▶ the ability to apply appropriate appraisal, scheduling and disposal procedures to managed electronic records.

Electronic Records Management System

- ▶ An Electronic Document and Records Management System (EDRMS) is a computer program (or set of programs) used to track and store records
- ▶ EDRMS provides a digital environment for storing electronic documents and applying standard records management practices.

Working with Files, Folders and Disks

- ▶ A file is a collection of digital data. The contents of a file can be a document (such as a Word memo or Excel spreadsheet), a digital photo or music track, or the executable code for a software program.
- ▶ A folder is like a master file; each folder can contain both files and additional folders.
- ▶ Learning how to use files and folders is a necessary skill for all computer users

Windows Explorer

- ▶ **Windows Explorer** is a file manager application that is included with releases of the Microsoft Windows operating system from Windows 95 onwards. It provides a graphical user interface for accessing the file systems. It is also the component of the operating system that presents the user interface on the monitor and enables the user to control the computer. It is sometimes referred to as the "Explorer".

Creating new folder

- ▶ To create a new folder, follow these steps:
- ▶ Navigate to the drive or folder where you want to place the new folder.
- ▶ Click the File menu; then select New Folder.
- ▶ A new, empty folder now appears within the Explorer window, with the filename New Folder highlighted.
- ▶ Type a name for your folder (which overwrites the New Folder name), and press Enter.

Creating Folders and Subfolders

- ▶ Create a new folder on the C:\ named TCDC-IMR Course
- ▶ Create three subfolders named IMR-August 2007, IMR-September 2008 and IMR-September 2009

Working with Files, Folders and Disks

▶ **Viewing Folders and Files**

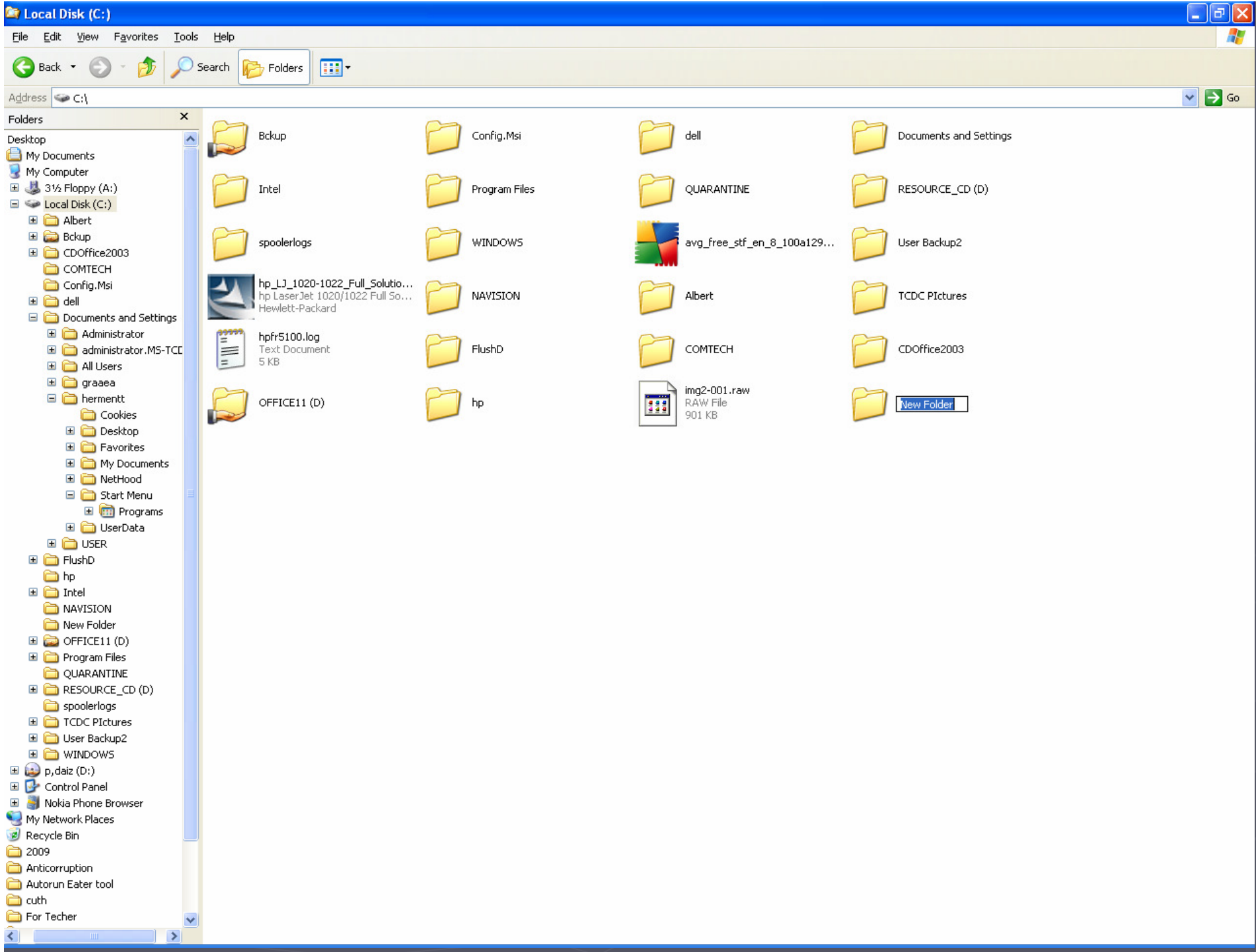
In Windows you can open Windows Explorer to view the folders and files on your system.

▶ **Sorting Files and Folders**

When viewing files in the Documents Explorer, you can sort your files and folders in a number of ways. To do this, right-click anywhere in the Explorer window, select the Arrange By option, and then choose to sort by Name, Date Modified, Type, Size,

Navigating Folders

- ▶ You can navigate through all your folders and subfolders as follows:
 - To view the contents of a disk or folder, double-click the selected item.
 - To move back to the disk or folder previously selected, click the Back button on the toolbar.



Adding password to a compressed file or folder

- ▶ To add a password to folder
- ▶ Right click on the file or folder, choose send to compressed file.
- ▶ Double click on the compressed file to open. On the menu bar click on File and then "Add a Password"
- ▶ Delete original uncompressed file or folder.

Renaming Files and Folders

- ▶ To rename a file (or folder), follow these steps:
 - Click the file or folder you want to rename.
 - Click the File menu then select Rename.
 - Type a new name for your folder (which overwrites the current name), and press Enter.

Backing Up Important Files

- ▶ The process of backing- up or copying electronic documents to a different disk or medium (tape, optical disc, magnetic disk, ...) off- line from what the documents were originally stored on. The archived documents are used primarily to restore a version of the files in the event of an accidental delete or major disaster.